



Solicitation Information
1 March 05

LOI #B04836

TITLE: Training Programs for Grant Administration

Submission Deadline: 24 March 05 at 1:40 PM

Questions concerning this solicitation may be e-mailed to the Division of Purchases at questions@purchasing.state.ri.us no later than **10 March 05 @ 12:00 Noon (EST)**. Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP / LOI # on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

SURETY REQUIRED: No

BOND REQUIRED: No

**Jerome D. Moynihan, C.P.M., CPPO
Administrator of Purchasing Systems**

**Vendors must register on-line at the State Purchasing Website at
www.purchasing.state.ri.us.**

NOTE TO VENDORS:

**Offers received without the entire completed three-page RIVP Generated Bidder
Certification Form attached may result in disqualification.**

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

The Rhode Island Department of Administration, Office of Purchases, on behalf of the State of Rhode Island Department of Health (HEALTH), Division of Management Services, requests Letters of Interest from qualified vendors of Training Programs regarding OMB Circulars pertaining to 1) Uniform Administrative Requirements for Grants and Agreements (to include, but not be limited to, OMB Circular # A-102 and 2 CFR Part 215) and 2) Cost Principles (to include, but not be limited to, OMB Circular #'s A87 and A-21). This solicitation is issued in accordance with the State's General Conditions of Purchase, which is available on the Internet at www.purchasing.ri.gov. Vendors that can demonstrate their knowledge, experience and capacity in this area are encouraged to submit a proposal in response to this request.

INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

Potential offerors are advised to review all sections of this solicitation carefully, and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content shall be borne by the offeror. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

Proposals misdirected to other State locations or which are otherwise not present in the Office of Purchases at the time of opening for any cause will be determined to be late and will not be considered.

In accordance with Title 7, Chapter 1.1 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). *This is a requirement only of the selected vendor(s).*

It is intended that an award pursuant to this Request will be made to a prime contractor, who will assume responsibility for all aspects of the work. Joint ventures and cooperative proposals will not be considered, but subcontracts are

permitted, provided that their use is clearly indicated in the offeror's proposal, and the subcontractor(s) proposed to be used are identified in the proposal.

Bidders are advised that all materials submitted to the State of Rhode Island for consideration in response to this Letter of Interest will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

NOTICE

THERE MAY BE ADDITIONAL ADDENDA TO THIS LOI AT ANY TIME BEFORE THE OPENING DATE AND TIME.

THE DIVISION OF PURCHASES WILL **NOT** BE NOTIFYING BY MAIL OF ANY SUCH ADDENDA.

IT IS THE **VENDOR'S RESPONSIBILITY** TO **CHECK** AND **DOWNLOAD** ANY AND ALL ADDENDA.

AN ADDENDUM TO AN LOI IS LISTED AS THE BID NUMBER WITH AN **"A"** AND THE NUMBER OF THE ADDENDUM FOLLOWING. FOR EXAMPLE, **3025A1** INDICATES ADDENDUM #1 HAS BEEN ISSUED FOR BID #3025. **3025A2** INDICATES ADDENDUM #2 HAS BEEN ISSUED.

YOU MUST CLICK ON **ALL** OF THESE LISTINGS TO GET THE **COMPLETE PACKAGE**.

The State of Rhode Island has a goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, visit the web site www.rimbe.org. To speak with an M.B.E. Officer, call (401) 222-6253.

BACKGROUND AND PURPOSE:

The Rhode Island Department of Health's (HEALTH) Division of Management Services, on behalf of all of HEALTH's various Divisions, provides and maintains a large number of Federally-funded Grant Agreements to community and governmental partners who work to improve the access, quality and availability of health care programs throughout Rhode Island.

The Division of Management Services recognizes that it is imperative for HEALTH and its providers to comply with Federal guidelines as they relate to the formulation and execution of grants and other agreements supported by Federal monies. Consequently, HEALTH wishes to make available two (2) Seminars of Training that, at a minimum, deal with its responsibility with regard to the Federal guidelines listed below:

Seminar #1

A-102

Grants and Agreements with State and Local Governments

2 CFR Part 215

Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals and Other Nonprofit Organizations (formerly OMB Circular A-110)

Seminar #2

A-87 & A-21

Cost Principles for State, Local and Indian Tribal Governments, and Colleges or Universities

SPECIFIC COURSE CONTENT:

The Office of Management Services shall expect each of the trainings to include, at a minimum, a discussion of the following topics:

Seminar #1 – Uniform Administrative Requirements for Grants and Agreements: OMB Circular A-102 and 2 CFR Part 215

1. A brief history of compliance with regard to agreements funded by Federal grant monies, especially as it relates to procedures of grant administration
2. Administrative Requirements, specifically:
 - a. Pre-Award Requirements
 - b. Post-Award Requirements including:
 - i. Financial and Program Management
 - ii. Property Standards
 - iii. Procurement Standards
 - iv. Reports, Records and Retention
 - v. Termination and Enforcement
 - c. After the Award Requirements
 - d. Contract Provisions
3. Current issues in compliance pertaining to grant administration, including pre-award activity through after-the-award requirements.

Seminar # 2 – Cost Principles: OMB Circulars A-87 and A-21

1. Brief history on the development of cost principles
2. The classification of costs as either direct or indirect
3. Focus on case studies to demonstrate the cost principles including appeals of unallowable costs.

4. Working with auditors
5. Discuss in detail any proposed changes to the OMB cost principles.

CONTRACT TERMS:

A contract will be established as a result of this solicitation. The term of this intended Agreement is for eight months to allow time for the scheduling of both training sessions. The *estimated* start date of this contract is May 1, 2005, or the date that a purchase order is issued. Any award resulting from this Request will be subject to the State's General Conditions of Purchase, which is available from the Internet at: www.purchasing.ri.gov as well as the terms of this Request.

The award resulting from this solicitation will be for both Seminars: 1) OMB Uniform Administrative Requirements for Grants and Agreements and 2) OMB Cost Principles. These seminars, each of two (2) day's duration, are to be completed in four (4) consecutive days within the time periods listed below:

June 13-17, 2005, **OR** October 10-14, 2005 **OR** October 17-21, 2005

Funding available for this award is limited to \$40,000.00

TOPIC AREAS OF SERVICES COVERED BY THIS REQUEST INCLUDE, BUT ARE NOT LIMITED TO:

The selected vendor shall conduct OMB Circular Training for two (2) seminars, with each class having not less than 25 or having more than 30 participants, at a site coordinated by HEALTH. Site and equipment procurement are not within the scope of this solicitation. The vendor shall provide specifications for any site and equipment requirements with the response to this solicitation. The duration of the training for each of the two seminars shall not exceed two days per week (two working days of eight hours each day including a one-hour lunch break each day). The vendor shall provide all training materials. The response to this solicitation shall specify all costs necessary to conduct the Federal guidelines training, including any per diem and travel costs for vendor staff. The Division of Management Services will have the responsibility for all site and equipment costs.

Vendor Qualifications

The selected vendor shall have:

1. Documented extensive experience in OMB Circular training with regard to OMB Circulars A-102, 2 CFR Part 215 (formerly A-110) and with A-87 and A-21, including an intensive four-day workshop combining expert instruction with practical exercises covering all the stages of preparing agreements, and the subsequent monitoring and approval of program expenditure.

2. An established training curriculum that is proven in practice.
3. Established effectiveness in improving the record of OMB compliance among program graduates.
4. Experience in concurrently training students with varied levels of knowledge of and experience in compliance as they pertain to both the creation and the administration of grants and agreements.
5. Experience with the specific needs of state government administrators to responsibly allocate resources from federal grants to both public and private providers.
6. Ability to customize training in accordance with the particular grants and agreements prepared by HEALTH for its grantor agencies.

Training Specifications

The selected vendor will provide:

1. A Seminar of Training to include two sessions in each of the following: OMB Circulars A-102, 2 CFR Part 215, **AND** in Circulars A-87 and A-21 of not less than 14 classroom hours for each seminar, including, but not limited to, the following topics:

Seminar 1 - Uniform Administrative Requirements for Grants and Agreements

Seminar 2 - Cost Principles as they relate to State Governments and Nonprofit Providers

2. All training materials
3. Course materials including any necessary texts, workbooks, and/or manuals.
4. A single examination at seminar's end, with individual test results to be made available to each participant in confidence.

QUESTIONS & SUBMISSION OF LETTER OF INTEREST

Questions concerning this solicitation may be e-mailed to the Division of Purchases at questions@purchasing.state.ri.us no later than the date and time indicated on page one of this solicitation. Please reference LOI # on all correspondence. Questions should be submitted in a *Microsoft Word attachment*. Answers to questions received, if any, will be posted on the Internet as an

addendum to this solicitation. It is the responsibility of all interested parties to download this information. If technical assistance is required to download, call the Help desk at (401) 222-2142, ext. 134.

Letters of Interest to provide the services covered by this Request must be received by the Division of Purchases on or before the date and time listed on page one of this solicitation. Responses received after this time, as registered by the official time clock in the reception area of the Office of Purchases, will not be considered.

Responses (an original plus three (3) copies) should be mailed or hand-delivered in a sealed envelope marked "LOI# B04836: Training Program for Grant Administration" to:

By Courier:

RI Dept. of Administration
Division of Purchases, 2nd floor
One Capitol Hill
Providence, RI 02908-5855

By Mail:

RI Department of Administration
Division of Purchases
P. O. Box 6528
Providence, RI 02940-6528

NOTE: Proposals received after the above-referenced due date and time will not be considered. Proposals misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and will not be considered. Proposals faxed, or emailed, to the Division of Purchases will not be considered. The official time clock is in the reception area of the Division of Purchases.

RESPONSE CONTENTS

Responses must include the following:

- A completed and signed three-page R.I.V.I.P generated bidder certification cover sheet (downloaded from the RI Division of Purchases Internet home page at <http://www.purchasing.state.ri.us>,
- A statement of experience describing the Vendor's background, qualification, and experience with and for similar projects, and all information described earlier in this solicitation.
- A completed and signed W-9 downloaded from the RI Division of Purchases Internet home page at <http://www.purchasing.state.ri.us>.
- Description of the corporate background of the offeror, if other than an independent contractor.
- As appropriate, resumes of key staff who may provide services covered by this request.

- A Cost Proposal describing the fee schedule for the services described.

EVALUATION CRITERIA:

Responses will be evaluated using the following criteria:

1. Capability (background) and qualifications are clearly demonstrated (0-20 pts);
2. Qualifications of Professional Staff as supported by resumes of key training staff (0-15 pts);
3. A clear understanding of the State's Requirements and the results intended (0-20 pts);
4. A Work Plan demonstrating Capacity, as evidenced by ability to offer a selection of training dates (0-15 pts);
5. Letters of Support endorsing this request have been attached (0-10 pts) and
6. A Cost Proposal (0-20 pts).
(Lowest cost / cost of proposal being evaluated X 20 points)

Notwithstanding the above, the State reserves the right to accept or reject any or all offerors. The State also reserves the right to make one or more awards as a result of this solicitation. The State also reserves the right to accept or reject any or all options, bids, proposals, to award on the basis of cost alone, and to act in its best interest.

Vendors must attain a minimum score of 75 to be considered. Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further.

The State may, at its sole option, elect to require presentation(s) by offerors clearly in consideration for award.

The Technical Review Committee will present finding, to the State Purchasing Agent, or his designee, who will make the final award selection.